

Job Aid:

How to Create a Bid Using Rolling or Open Enrollment

This Job Aid Shows How To:

Create a Bid Using Rolling or Open Enrollment

Of Special Note:

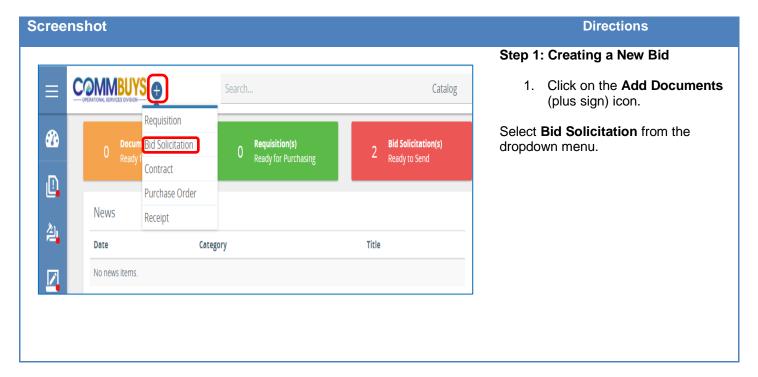
Guidance for rolling and open enrollments can be found in Section III, E, xi, c of the Best Value Procurement Handbook.

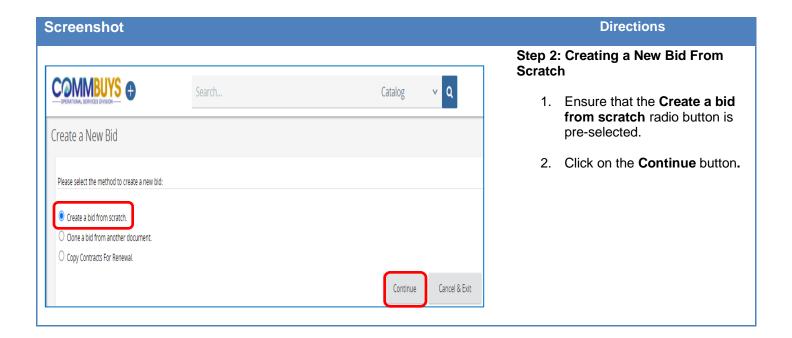
Rolling Enrollment:

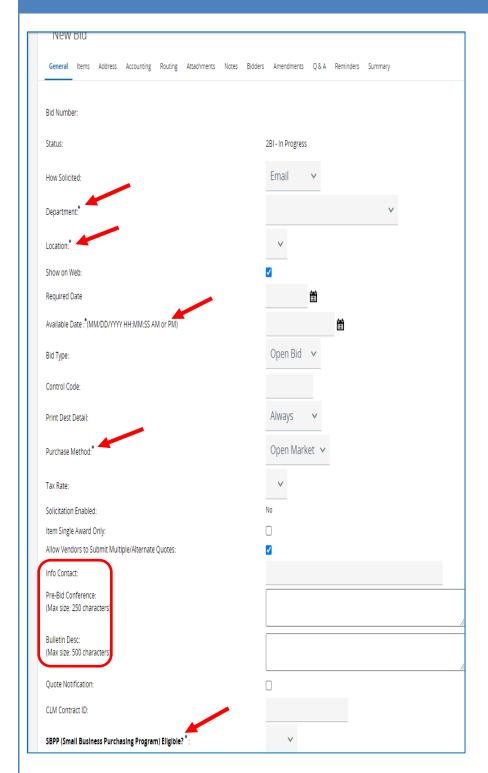
- Allows you to accept bids and review them as they come.
- Has one enrollment period to award vendors to an established contract
- Allows purchaser to award vendors anytime
- Must act as informal

Open Enrollment:

- Allows you to re-open the contract at any time (or at set intervals) to add new vendors.
- Allows adding vendors to an established contract
- Allows awarding to vendors during the open enrollment period
- Has multiple quote submission periods
- Must act as informal

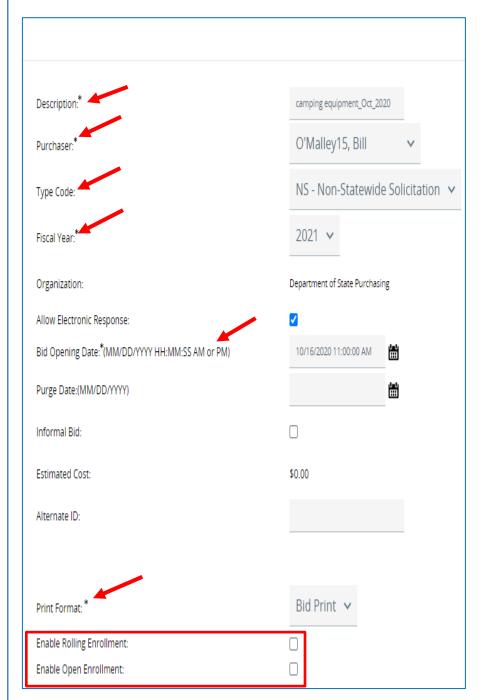






Step 3: Completing the Left Side of the New Bid Screen

- The New Bid screen opens to the General tab. On the left side of the screen, all fields with an asterisk are required. The required fields are:
 - Department: This defaults from the user profile. It may be changed using the dropdown if other departments are available to the user.
 - Location: This defaults from the user profile. It may be changed using the dropdown if other locations are available to the user.
 - Available Date: This identifies when the bid becomes available for vendor viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking the **Now** button inserts the current date and time into this field. Click the **Done** button when you have entered the desired date. You can enter a different date and/or time using the calendar and scroll bar. NOTE: If you need to change the calendar year, do so before changing the month and day.
 - Purchase Method: Keep the Open Market default.
 - SBPP (Small Business Purchasing Program)
 Eligible?: Select "Yes" if up to \$150K or "No" if over \$150K
- 2. Optional fields include:
 - **Info Contact:** The contact person for this bid.
 - Pre-Bid Conference: This field is available to capture bid conference information if applicable.
 - Bulletin Description: This field is available for a brief description of the bid and how it will display.

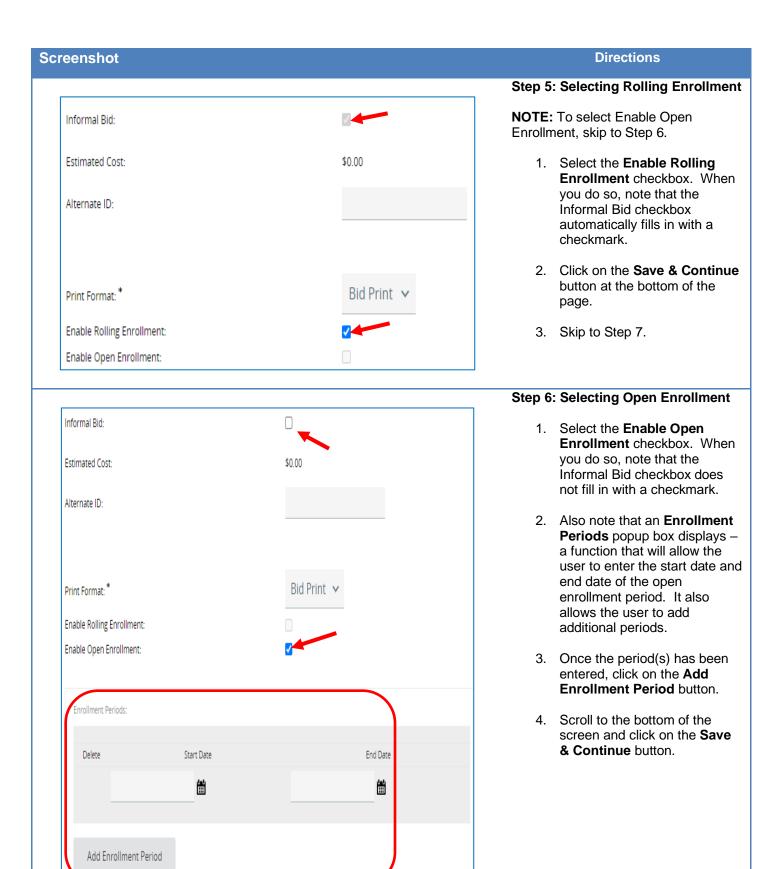


Step 4: Completing the Right Side of the New Bid Screen

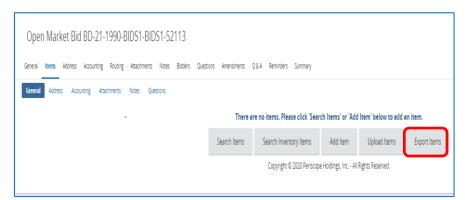
- All fields with an asterisk are required. The required fields are:
 - Description: Title of your bid. This field is used as search criteria to locate a bid, so be specific.
 - Purchaser: This defaults to your name. Use the dropdown to select a different purchaser.
 - Type Code does not have an asterisk but is required. Enter NS (non-statewide solicitation) if posted for a good or service not on a SWC. Enter SS (statewide solicitation) if posted as a requirement for purchasing off a SWC.
 - Fiscal Year: This field defaults to the current Fiscal Year. Use the dropdown to select a different year if appropriate.
 - Bid Opening Date: This date is the date that will close the bid to the public. On this date, COMMBUYS will no longer accept quotes for that bid and the Buyer will be able to open and view the quotes. This date can be changed in the same manner as the Available Date.
 - **Print Format**: Leave Bid Print as the default.

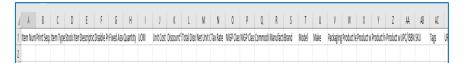
The optional fields at the bottom of the screen are available to choose <u>either</u> rolling or open enrollment. For some organizations, these fields may need to be configured by your COMMBUYS Organization Administrator.

- Enable Rolling
 Enrollment: Selecting
 this checkbox allows you
 to accept bids and review
 them as they come.
- Enable Open Enrollment: Selecting this checkbox allows you to re-open the contract at any time (or at set intervals) to add new vendors.



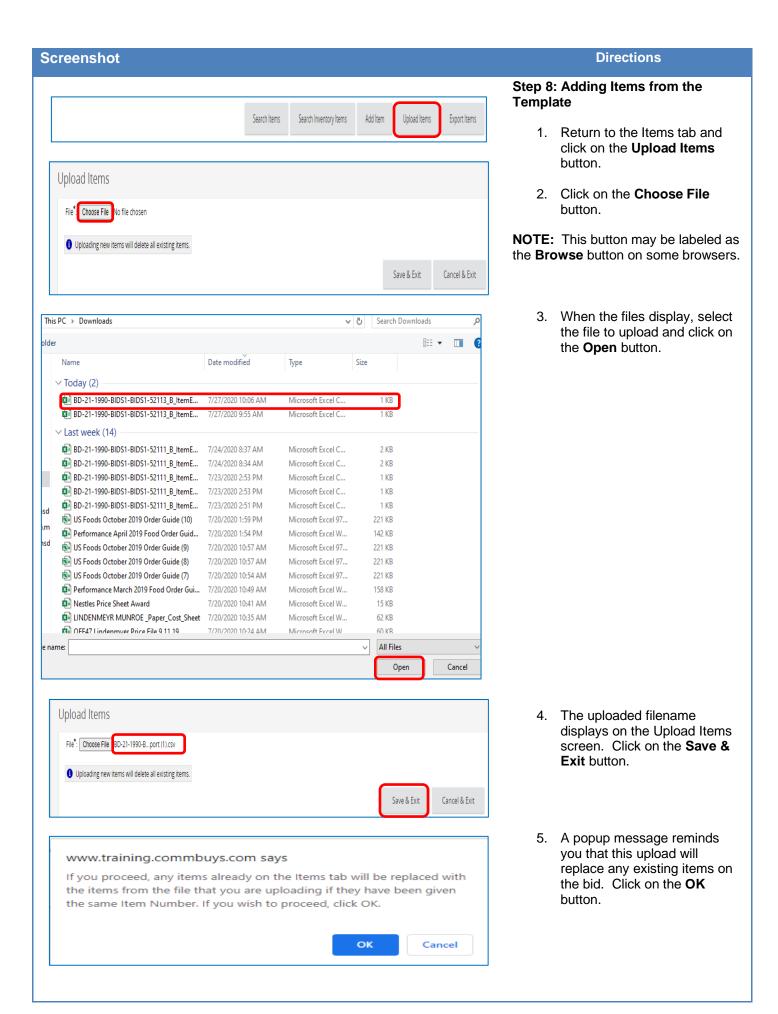


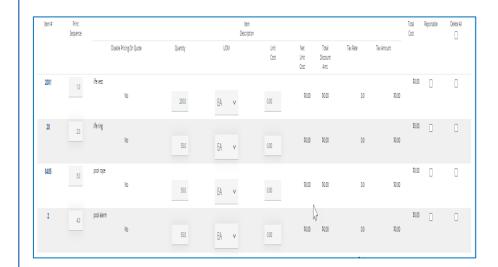




Step 7: Completing the Items Tab

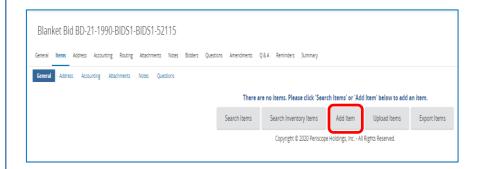
- 1. Click on the **Items** tab.
- If you would like to include the items in an attachment or add a few items manually on a one-by-one basis, go to Step 10.
- 3. If you intend to add items to the COMMBUYS .csv (comma separated values) template, click on the **Export Items** button. A .csv file box displays on the bottom of your screen. Click on the .csv file to open the Items template.
- 4. Complete the columns in the template, either by copying over from a saved template, a saved file (for example, another Excel .xls or .csv file), or by manually entering the items. The required fields include: Item Number, Print Sequence, Item Type, Description, Quantity, UOM (Unit of Measure), NIGP Class ID (UNSPSC Segment-Family), and NIGP Class Item (UNSPSC Class).
- Save this file as a .csv file to your desktop, downloads, documents file or other location.

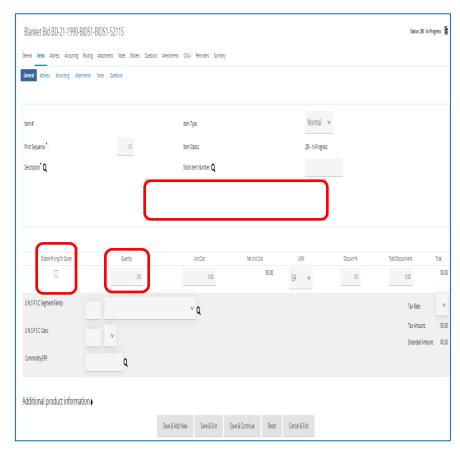




Step 9: Verifying the Upload

- Review the upload for accuracy. If errors are found, the uploaded file can be corrected and then uploaded.
- 2. Go to Step 11.





Step 10: Adding Items as an Attachment or by Manual Entry

- 1. Click on the **Add Item** button.
- Enter a description of the item in the **Description*** field (4000 character capacity). If attaching items, use a general description of the items.
- For items to be included in an attached Bid Solicitation, select the **Disable Pricing on Quote** checkbox. This will force bidders to provide item pricing within their attached quote.

NOTE: For manual (one-by-one) entry, do not check this box.

- Enter a desired quantity in the quantity field if known or enter
 1.0 if the desired item is a service, or if the items will be described in an attachment.
- Change the **UOM** (Unit of Measure) field if needed using the dropdown menu.
- Enter the first four characters of the UNSPSC in the UNSPSC Segment-Family: field
- 7. Enter the next two characters of the UNSPSC in the UNSPSC Class: field.
- Enter the Commodity-EPP
 Code in the Commodity-EPP
 field: by clicking on the
 magnifying glass next to the
 Commodity-EPP field,
 selecting the code from the
 menu, clicking on the Find It
 button, selecting the radio
 button in the Select column of
 the desired code, and clicking
 on the Select button.

NOTE: If the UNSPSC Segment-Family and/or Class fields are known, they can be entered directly into the fields. If unknown, click on the magnifying glass icon, enter a keyword in the **UNSPSC Keyword**

field and click on the **Search** button.

NOTE: UNSPSCs can also be found using the dropdown menus next to each field, by using the UNSPSC Lookup Tool on the COMMBUYS Landing Page, or by going to unspsc.org.

 Repeat this Step if manually adding more items, by clicking on the Save & Add New button. If complete, click on the Save & Exit button.



Step 11: Verifying the Address Tab

Click on the Address tab.
 Verify that the Ship-to and Bill-to addresses are correct. If not, click on the magnifying glass icon to select an alternative.

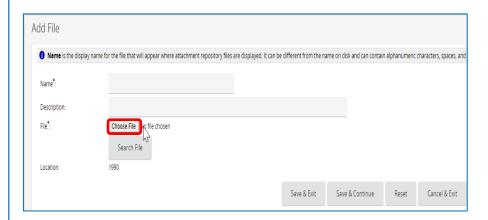
NOTE: The Accounting tab is not used in COMMBUYS. The following tab is the Routing tab which displays the path this document will follow towards approval. It is not activated until after you submit the document for approval.



Step 12: Adding Attachments

Attachments may include all the elements of a Bid Solicitation including the solicitation (RFR, etc.), terms and conditions, a list of the items, and so on.

- 1. Click on the **Attachments** tab.
- 2. Click on the **Add File** button.



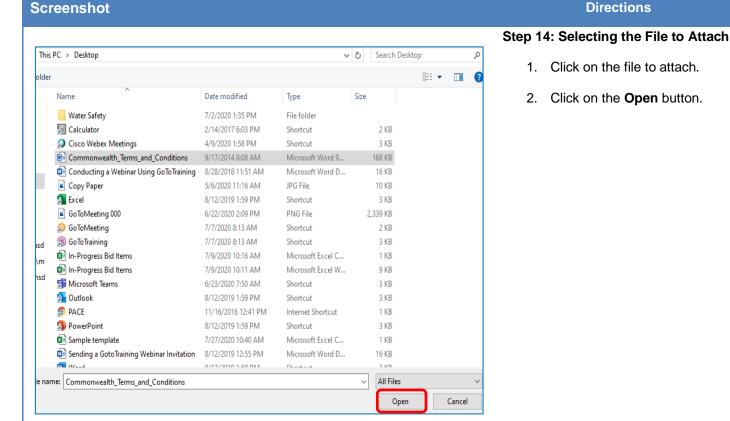
Step 13: Choosing a File to Attach

1. Click on the **Choose File** button.

NOTE: This button may be labeled **Browse** in some browsers.

- 2. Select the desired file from its location (C: drive, shared drive, flash drive, documents folder, desktop, etc.).
- Complete the following fields • Name – required; but will be populated with the selected file name if left blank • Description – optional.
- Click on the Save & Exit button to add another file or when all files have been added.

NOTE: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the repository, click on the **Search File** button and complete the advanced search criteria.



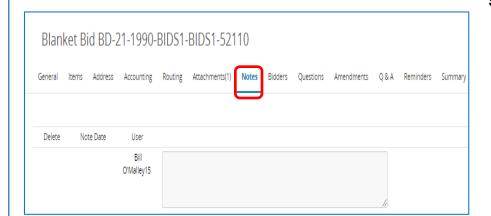
Directions

- 1. Click on the file to attach.
- 2. Click on the Open button.

Step 15: Adding Notes

- 1. Click on the Notes tab if you would like to add an internal note. If not, go to Step 13.
- 2. When complete, click on the Save & Continue button. Additional notes may be added if needed.

NOTE: Notes are viewable by you and others in your work group. These are not viewable by the vendor, however, keep in mind that this information may be made available externally due to Freedom of Information requests.



General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q.&.A Reminders Summary Vendor Validation Warnings No bid bidder Select bidder participation, open or closed, and select vendors to notify $\ensuremath{\bigcirc}$ Unrestricted bid, all vendors can view and respond O Restricted bid, only selected vendors can view and respond Vendor ID Vendor Name Show Estimated Total To Vendors Show Unit Prices to Vendors Hide Bid Holder List on Vendor Side 1 Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes. Save & Continue Lookup & Add Vendors

Screenshot

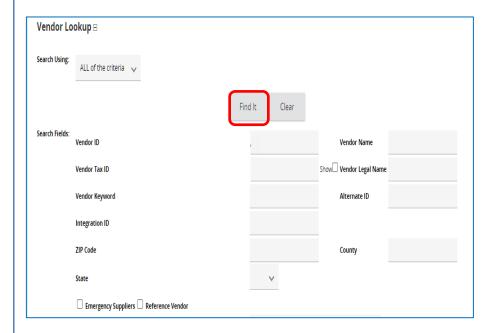
Directions

- Step 16: Identifying Bidders
 - To add bidders, click on the Lookup & Add Vendors button at the bottom of the

1. Click on the **Bidders** tab.

NOTE: You have the option to not select any Bidders.

page.



Step 17: Searching for Vendors

A Lookup & Add Reference Vendors popup window appears with a Vendor advanced search page. You can either:

 enter vendor search criteria and click on the Find It button (commonly used for one-time only Open Market Bids), or

 scroll to the bottom of the page and click on the Find Vendors for All Commodity-EPP on the Req button (commonly used for Blanket Bid Solicitations)

Find It

Clear

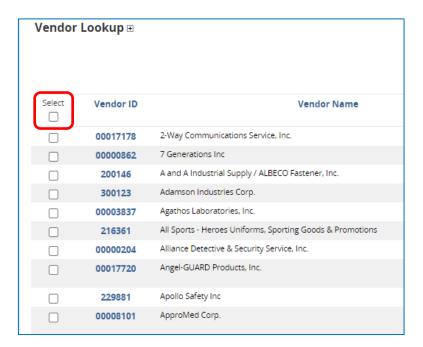
Find Vendors for All Commodity-EPPs on the Bid

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Close Window

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

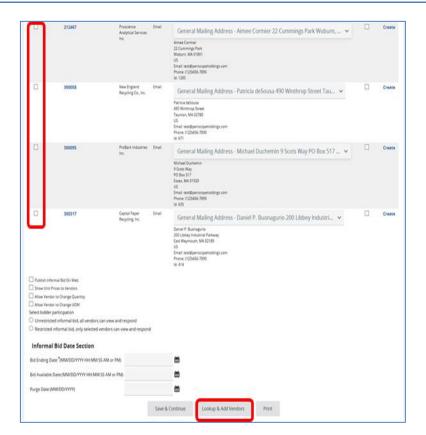
0 1 2 3 4 5 6 7 8 9 10



Step 18: Selecting Bidders

The results display with all bidders who registered in COMMBUYS using the same commodity code as you entered on the Items tab, or with all bidders meeting the criteria you entered using the Find It button.

- Select the checkbox in the Select column next to the desired bidders (restricted bid) or select the top checkbox in the Select column to include all the listed bidders (best practice – unrestricted bid).
- If selecting the top checkbox, a popup window displays reminding you that all bidders on the list will be notified.
 Click on the **OK** button.
- Click on the Save & Exit button at the bottom of the page to return to the Bidders tab.

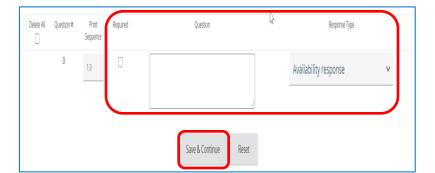


Step 19: Verifying the Bidders

The Bidders tab now displays all the bidders you selected.

You can delete bidders using the checkboxes in the **Delete** column, and/or you can continue to add bidders by clicking on the **Lookup & Add Vendors** button.

NOTE: Generally, as a best practice, bidders should not be deleted from Bid Solicitations without good cause.

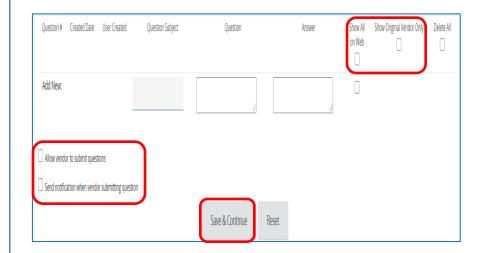


Step 20: Completing the Questions Tab

If you have questions to ask of bidders:

- 1. Click on the Questions tab.
- 2. Select the **Required** checkbox. Doing so will require bidders to answer the question before their quote can be submitted.
- 3. Enter the question text in the **Question** field.
- Select a value from the Response Type dropdown list to establish a format for the vendor response.
- 5. Click on the **Save & Continue** button to save your entries.

NOTE: The next tab is the **Amendments** tab which has no functionality until after the bid is sent.



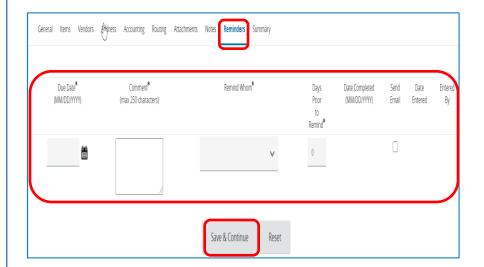
Step 21: Completing the Q&A Tab

- 1. Click on the Q&A tab.
- 2. To dialogue with bidders, select the **Allow vendor to submit questions** checkbox.
- If you would like COMMBUYS to notify you by email when a bidder submits a question, select the Send notification when vendor submitting question checkbox.

NOTE: Numbers 2 & 3 above are considered a best practice.

4. Click on the **Save & Continue** button.

NOTE: When a question is received, provide an answer and ensure that the Show All on Web checkboxes are checked, and that the Show Original Vendor Only checkboxes are unchecked. This is the best practice as all questions and answers will be viewable by all bidders. All questions and answers may be subject to disclosure through Freedom of Information Act requests.



Step 22: Entering Reminders

- Click on the Reminders tab if you want to send a reminder to yourself or another person within your organization. If not, go to Step 20.
- Use the calendar icon in the Due Date* field to select the date of the reminder.
- 3. Enter your reminder text in the **Comment*** field.
- Select yourself or another internal recipient from the dropdown menu next to the Remind Whom* field.
- If an advanced reminder (tickler message) is desired, enter a number in the Days Prior to Remind* field.
- Click on the **Send Email** checkbox to ensure that the
 reminder notification is
 emailed to the intended
 recipient.

When complete, click on the **Save** & **Continue** button.

Screenshot Directions Step 23: Submitting for Approval There is no item accounting available for this item. 1. Click on the **Summary** tab to review the bid information. 2. Scroll to the bottom of the Cancel Bid page and click on the Submit for Approval button. NOTE: If you decided not to select any Bid BD-21-1990-BIDS1-BIDS1-52115 - Validation Warning(s) Bidders, a Validation Warning displays with a reminder that a bidder has not yet been selected. Click on the Warnings Continue button. No bid bidder. You may click Continue to ignore the warning(s) and continue submitting the bid, or click Cancel & Exit to cancel the bid submission and go back to the bid. Continue Cancel & Exit **Send Bid Actions** 3. Following approval, return to the bid and click on the Send Bid button near the bottom of ● Change bid status to "Sent" and notify vendors Change bid status to "Sent" only. the Summary page. Send Bid

Cancel Bid

Clone Bid

Print